

## **Boston EITC Action Coalition 2003 Tax Preparation Activities**

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### **Coalition members operated 15 public tax prep sites across the city of Boston:**

- Codman Square Health Center
- Dorchester NSC
- East Boston APAC
- Elm Hill FSC
- Hispanic Office of Planning & Evaluation
- IBA
- JVS Center for Careers and Lifelong Learning
- ABCD LearningWorks
- Mattapan FSC
- Oak Square YMCA
- Parker Hill/Fenway NSC
- Roxbury Resource Center
- SNAP
- South Boston APAC
- United South End Settlements

### **2003 Goals**

- To serve at least 1,500 taxpayers.
- To return at least \$1.5 million to Boston's low-income taxpayers.
- To train 300 volunteer tax preparers.
- To connect low-income taxpayers to financial literacy services.
- To work with local banks to provide un-banked taxpayers with alternatives to check cashers.

### **2003 Achievements**

- We served 3,985 taxpayers.
- We returned \$5.2 million to Boston's low-income taxpayers.
- 154 volunteers prepared taxes.
- We connected at least 75 low-income taxpayers to financial literacy services.
- We worked with 7 local banks to provide un-banked taxpayers with alternatives to check cashers.

### **2004 Goals**

- To serve at least 6,000 taxpayers.
- To return at least \$8 million to Boston's low-income taxpayers.
- To train 300 volunteer tax preparers.
- To connect at least 1,000 low-income taxpayers to financial literacy services.
- To work with at least 10 location banks who will help provide taxpayers with financial literacy services and banking alternatives.

## **What characterizes the taxpayers served in 2003 by the Boston EITC Coalition?**

- The median Adjusted Gross Income was \$14,343.50.
- The median refund was \$945.00.
- Less than half of taxpayers served qualified for the Earned Income Tax Credit.
  
- 50% heard about Coalition tax preparation sites from someone they know.
- 29% heard about Coalition tax preparation sites from a flyer, poster or print ad.
- 2.1% saw a subway or bus advertisement for Coalition tax preparation sites.
  
- 67% were female and 33% were male.
- 59% filed as Single and 30% filed as Head of Household.
- The average multi-person household was headed by a single person and had 1 dependent.
  
- 55% were African American and 24% were Hispanic.
- 62% were registered to vote.
  
- 80% filed taxes in 2002.
  - 91% of filers got tax refunds in 2002.
  - 52% of filers received the EITC in 2002.
  - 33% of filers filed with a free assistance site in 2002.
  - 26% of filers filed with a commercial preparer in 2002 and 12% of that group got a RAL.
  - 5% of filers got a Rapid Anticipation Loan in 2002.
  
- 77% of taxpayers served were banked and 76% used a bank in 2002 to cash their refund.  
18% of taxpayers served didn't have an account, but wanted one.  
5% didn't have an account and didn't want one.
  
- 60% of filers didn't want to use Direct Deposit.
  
- 62% of taxpayers planned to pay bills, utilities or buy groceries with this year's refund.  
34% of taxpayers planned to save some of their refund.
  
- 25% would like help with solving credit problems.  
18% would like help with saving and investing.
  
- 40% were interested in buying a house.  
29% were interested in buying a car.
  
- 19% were interested in applying for food stamps.